

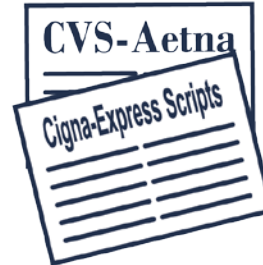
2018 Sets the Stage for Continual Market Upheaval Over the Next 12 Months



United Expands Specialty Pharmacy Capabilities with Avella and Genoa Healthcare Acquisitions



WellCare Expands Government Business Presence with Aetna's PDP and Meridian Also Gains Integrated PBM Platform, MeridianRx



Mega-Mergers **CVS-Aetna** and **Cigna-Express Scripts** Greenlighted by DOJ



Humana Intensifies Investments in Care Delivery with Kindred Purchase, Walgreens Alliance, and Launch of a Digital Health Center



Centene Prepares for National Roll-Out of Strategic Partnership with PBM RxAdvance

IMPLICATIONS

As leading payers continue to execute strategic acquisitions and alliances, biopharmaceutical companies need to develop multi-pronged approaches to develop and maintain relationships with these accounts. Strategies should examine how to gain favorable product market access but also how to create value beyond their products.

Source: Health Strategies Group, Leading Health Plans and PBMs, November 2018.